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2015 Nonresident Visitation, Expenditures & Economic Impact Estimates: Estimates by full year, quarters, trip purposes, and international visitors

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2015 Nonresident Visitation, Expenditures & Economic Impact Estimates

Estimates by full year, quarters, trip purposes &
international visitors*

Kara Grau, M.S.

9/21/2017

A collection of 2015 full year and quarterly estimates of nonresident visitation, expenditures by nonresident travelers, and economic impact estimates, including expenditures by purpose of trip, airport of arrival, and international visitors.

Revised, see Author Note, page ii

Visitation, Expenditures & Economic Impact Estimates *Revised*

Prepared by

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Revised September 21, 2016

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2015 Nonresident Visitation, Expenditures & Economic Impact Estimates

2017

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Author note about revised numbers:

ITRR has recalibrated numbers for 2015 and 2016 to reflect final numbers. These changes were needed due to an over-estimation of spending behavior in three categories. Subsequently, all three categories are downward adjusted. The new adjustment brings the categories in line with available secondary data estimates.

- *Made in MT and Farmers Market estimates were previously based on nonresidents identifying their full trip spending in Montana. These numbers are now divided by their length of stay to obtain daily spending and thus mirror the methods used for the other categories.*
- *Within Licenses, Fees, and Admissions, ITRR surveyors now also ask if they paid for their licenses (hunting and fishing) on line. This increased the estimates. However, because a hunting or fishing license is good for many days, this expenditure is also divided by the visitor's length of stay.*

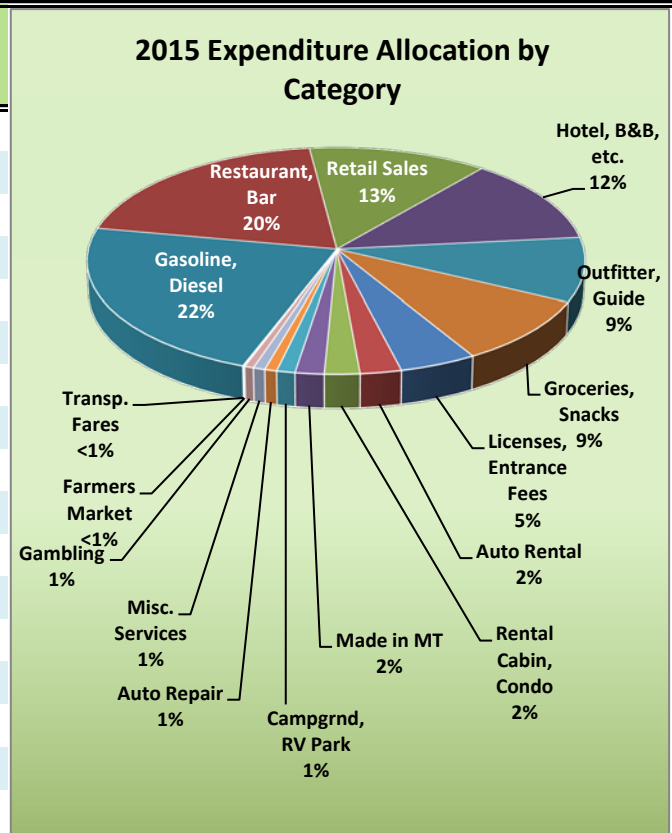
2015 Montana Nonresident Traveler Expenditures & Economic Contribution

2015 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2015, nonresident visitors to Montana spent an estimated \$3.23 billion in the state. (See Table 1 below)
- This \$3.23 billion in local spending directly supports \$2.78 billion of economic activity in the state, and supports an additional \$1.82 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$4.60 billion in 2015.

Table 1 - 2015 Nonresident Traveler Expenditures¹

| Expenditure Category | Average Daily Per Group ^{2,3} | Allocation by Category | Total Expenditures ^{2,4} |
|-------------------------|--|------------------------|-----------------------------------|
| Gasoline, Diesel | \$29.48 | 22% | \$726,620,000 |
| Restaurant, Bar | \$26.40 | 20% | \$647,640,000 |
| Retail Sales | \$16.70 | 13% | \$412,890,000 |
| Hotel, B&B, etc. | \$16.52 | 12% | \$403,490,000 |
| Outfitter, Guide | \$12.25 | 9% | \$295,800,000 |
| Groceries, Snacks | \$12.15 | 9% | \$298,020,000 |
| Licenses, Entrance Fees | \$6.04 | 5% | \$147,010,000 |
| Auto Rental | \$3.19 | 2% | \$78,310,000 |
| Rental Cabin, Condo | \$2.78 | 2% | \$66,970,000 |
| Made in MT | \$2.22 | 2% | \$54,770,000 |
| Campground, RV Park | \$1.43 | 1% | \$34,910,000 |
| Auto Repair | \$0.93 | 1% | \$22,970,000 |
| Misc. Services | \$0.89 | 1% | \$22,310,000 |
| Gambling | \$0.70 | 1% | \$17,290,000 |
| Farmers Market | \$0.13 | <1% | \$3,030,000 |
| Transportation Fares | \$0.04 | <1% | \$920,000 |
| Estimated Total | \$131.85 | | \$3,232,960,000 |



¹Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT.

²Data are collected quarterly. Therefore, avg. daily expenditures are weighted averages of quarterly figures. ³Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ⁴Expenditure category totals may not add to year total due to rounding.

| Table 2 - 2015 Economic Impact | Direct | Indirect | Induced | Combined |
|--------------------------------|-----------------|---------------|---------------|-----------------|
| Industry Output | \$2,777,180,000 | \$939,970,000 | \$882,070,000 | \$4,599,220,000 |
| Employment (# of jobs) | 38,340 | 6,800 | 7,260 | 52,400 * |
| Employee Compensation | \$816,250,000 | \$204,800,000 | \$234,760,000 | \$1,255,810,000 |
| Proprietor Income | \$113,370,000 | \$53,650,000 | \$40,140,000 | \$207,160,000 |
| Other Property Type Income | \$347,260,000 | \$158,310,000 | \$158,970,000 | \$664,540,000 |
| State & Local Taxes | — | — | — | \$191,700,000 |

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Output is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

* **CHANGE:** The IMPLAN 2015 data set incorporates more data sources than previous data sets, as well as more involved methods of estimating Proprietor vs. Wage & Salary Employment. Comparison to years prior to 2015 is not advised.

Montana Nonresident Traveler Expenditure Profiles

Average 2015 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

| | All Travelers | Vacation | VFR ¹ | Pass-Through | Business | Shopping* | Other* |
|-----------------------------------|-----------------|-----------------|------------------|----------------|-----------------|-----------------|-----------------|
| Sample size | 14,082 | 4,957 | 2,481 | 4,238 | 1,748 | 289 | 359 |
| Nonresident Travelers | 11,730,000 | 4,130,000 | 2,070,000 | 3,530,000 | 1,460,000 | 240,000 | 300,000 |
| Group Size (people/group) | 2.19 | 2.58 | 2.12 | 2.06 | 1.48 | 2.15 | 2.04 |
| Length of Stay (nights) | 4.59 | 6.12 | 6.49 | 0.94 | 6.46 | 0.57 | 6.97 |
| % of All Travelers in 2015 | 100% | 35% | 18% | 30% | 12% | 2% | 3% |
| Gasoline, Diesel | \$29.48 | \$23.96 | \$17.51 | \$46.23 | \$24.52 | \$32.61 | \$27.23 |
| Restaurant, Bar | \$26.40 | \$35.79 | \$29.39 | \$13.44 | \$28.52 | \$16.67 | \$22.60 |
| Retail Sales | \$16.70 | \$19.39 | \$19.20 | \$6.26 | \$16.20 | \$104.76 | \$25.04 |
| Hotel, B&B, etc. | \$16.52 | \$20.06 | \$9.99 | \$14.06 | \$24.62 | \$6.43 | \$15.19 |
| Outfitter, Guide | \$12.25 | \$28.85 | \$4.32 | \$0.43 | \$3.90 | \$0.00 | \$2.90 |
| Groceries, Snacks | \$12.15 | \$16.30 | \$14.17 | \$6.51 | \$8.57 | \$21.83 | \$12.99 |
| Licenses, Entrance Fees | \$6.04 | \$17.05 | \$4.34 | \$0.89 | \$2.19 | \$1.54 | \$3.97 |
| Auto Rental | \$3.19 | \$3.76 | \$3.28 | \$0.25 | \$9.46 | \$0.14 | \$1.81 |
| Rental Cabin, Condo | \$2.78 | \$5.88 | \$2.36 | \$0.40 | \$1.07 | \$0.00 | \$0.92 |
| Made in MT | \$2.22 | \$2.95 | \$2.71 | \$1.31 | \$2.01 | \$0.58 | \$2.21 |
| Campground, RV Park | \$1.43 | \$2.47 | \$0.54 | \$1.03 | \$0.34 | \$0.05 | \$0.35 |
| Auto Repair | \$0.93 | \$0.74 | \$0.99 | \$0.89 | \$1.26 | \$0.00 | \$2.57 |
| Misc. Services | \$0.89 | \$1.61 | \$0.82 | \$0.26 | \$0.58 | \$1.52 | \$3.17 |
| Gambling | \$0.70 | \$0.82 | \$1.32 | \$0.27 | \$0.82 | \$0.48 | \$0.43 |
| Farmers Market | \$0.13 | \$0.19 | \$0.16 | \$0.03 | \$0.05 | \$0.00 | \$0.12 |
| Transportation Fares | \$0.04 | \$0.05 | \$0.05 | \$0.02 | \$0.07 | \$0.00 | \$0.02 |
| Total Avg. Daily per Group | \$131.85 | \$179.88 | \$111.13 | \$92.27 | \$124.18 | \$186.61 | \$121.52 |

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

| Expenditure Category | # of Groups Who Spent | Percent of Sample (n=11,989) | Mean ² of Those Who Spent | Median ³ of Those Who Spent |
|-------------------------|-----------------------|------------------------------|--------------------------------------|--|
| Gasoline, Diesel | 7772 | 65% | \$45.67 | \$38.00 |
| Restaurant, Bar | 6369 | 53% | \$49.34 | \$35.00 |
| Hotel, B&B, etc. | 4086 | 34% | \$118.00 | \$105.24 |
| Groceries, Snacks | 3995 | 33% | \$36.48 | \$20.00 |
| Retail Sales | 1882 | 16% | \$108.28 | \$50.00 |
| Licenses, Entrance Fees | 1805 | 15% | \$44.79 | \$12.50 |
| Made in MT | 1764 | 15% | \$15.28 | \$6.67 |
| Campground, RV Park | 1201 | 10% | \$35.09 | \$34.00 |
| Auto Rental | 832 | 7% | \$47.52 | \$50.00 |
| Rental Cabin, Condo | 525 | 4% | \$151.05 | \$150.00 |
| Outfitter, Guide | 426 | 4% | \$317.95 | \$319.05 |
| Farmers Market | 395 | 3% | \$3.33 | \$2.51 |
| Misc. Services | 284 | 2% | \$40.79 | \$20.00 |
| Gambling | 240 | 2% | \$36.55 | \$25.00 |
| Auto Repair | 109 | 1% | \$94.84 | \$93.11 |
| Transportation Fares | 30 | <1% | \$15.57 | \$14.83 |

*Data are collected quarterly.

Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures.

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.^{^^}These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 1, 2015

Montana Nonresident Traveler Expenditure Profiles

Average Q1 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

| | All Travelers | Vacation | VFR ¹ | Pass-Through | Business | Shopping* | Other* |
|-----------------------------------|-----------------|-----------------|------------------|----------------|-----------------|-----------------|-----------------|
| Sample size | 2,617 | 490 | 451 | 995 | 486 | 97 | 98 |
| Nonresident Travelers | 1,434,000 | 268,000 | 247,000 | 545,000 | 267,000 | 53,000 | 54,000 |
| Group Size (people/group) | 2.03 | 2.87 | 2.01 | 1.92 | 1.48 | 1.92 | 1.88 |
| Length of Stay (nights) | 3.40 | 5.88 | 5.66 | 0.73 | 4.67 | 0.29 | 4.47 |
| % of All Travelers in Q1 | 100% | 19% | 17% | 38% | 19% | 4% | 4% |
| Gasoline, Diesel | \$29.76 | \$19.29 | \$18.45 | \$42.55 | \$25.83 | \$27.93 | \$21.83 |
| Restaurant, Bar | \$25.55 | \$53.17 | \$24.62 | \$12.31 | \$30.25 | \$15.10 | \$21.92 |
| Hotel, B&B, etc. | \$24.62 | \$35.55 | \$14.97 | \$16.95 | \$43.07 | \$4.35 | \$23.42 |
| Retail Sales | \$18.84 | \$31.76 | \$18.35 | \$6.23 | \$16.56 | \$85.91 | \$23.57 |
| Licenses, Entrance Fees | \$15.68 | \$75.06 | \$9.89 | \$0.54 | \$4.31 | \$0.12 | \$5.55 |
| Groceries, Snacks | \$12.59 | \$20.11 | \$16.50 | \$6.20 | \$10.75 | \$30.68 | \$13.25 |
| Outfitter, Guide | \$6.28 | \$33.86 | \$0.66 | \$0.07 | \$0.71 | \$0.00 | \$0.00 |
| Auto Rental | \$4.52 | \$8.11 | \$2.66 | \$0.19 | \$12.49 | \$0.00 | \$4.35 |
| Rental Cabin, Condo | \$3.16 | \$13.66 | \$1.52 | \$0.30 | \$1.78 | \$0.00 | \$0.56 |
| Made in MT | \$2.14 | \$4.71 | \$2.61 | \$0.60 | \$2.68 | \$0.01 | \$3.42 |
| Misc. Services | \$1.52 | \$4.31 | \$1.54 | \$0.14 | \$0.46 | \$4.67 | \$4.18 |
| Gambling | \$0.97 | \$1.08 | \$1.26 | \$0.30 | \$1.92 | \$1.29 | \$0.78 |
| Auto Repair | \$0.17 | \$0.22 | \$0.25 | \$0.16 | \$0.14 | \$0.00 | \$0.00 |
| Transportation Fares | \$0.05 | \$0.08 | \$0.03 | \$0.02 | \$0.06 | \$0.00 | \$0.19 |
| Campground, RV Park | \$0.01 | \$0.00 | \$0.00 | \$0.03 | \$0.01 | \$0.00 | \$0.00 |
| Farmers Market | \$0.00 | \$0.00 | \$0.01 | \$0.00 | \$0.00 | \$0.00 | \$0.01 |
| Total Avg. Daily per Group | \$145.86 | \$300.97 | \$113.32 | \$86.59 | \$151.03 | \$170.06 | \$123.03 |

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

| Expenditure Category | # of Groups Who Spent | Percent of Sample (n=2,188) | Mean ² of Those Who Spent | Median ³ of Those Who Spent |
|-------------------------|-----------------------|-----------------------------|--------------------------------------|--|
| Gasoline, Diesel | 1547 | 71% | \$42.08 | \$35.00 |
| Restaurant, Bar | 1177 | 54% | \$47.51 | \$30.00 |
| Hotel, B&B, etc. | 735 | 34% | \$108.38 | \$100.00 |
| Groceries, Snacks | 735 | 34% | \$37.46 | \$15.00 |
| Retail Sales | 321 | 15% | \$128.17 | \$60.64 |
| Made in MT | 256 | 12% | \$18.47 | \$8.00 |
| Licenses, Entrance Fees | 254 | 12% | \$135.26 | \$74.10 |
| Auto Rental | 181 | 8% | \$54.64 | \$55.80 |
| Rental Cabin, Condo | 88 | 4% | \$116.27 | \$111.66 |
| Misc. Services | 87 | 4% | \$37.91 | \$15.00 |
| Gambling | 61 | 3% | \$34.70 | \$20.00 |
| Outfitter, Guide | 49 | 2% | \$277.68 | \$324.76 |
| Auto Repair | 13 | 1% | \$28.78 | \$43.66 |
| Campground, RV Park | 12 | 1% | \$4.51 | \$5.83 |
| Transportation Fares | 7 | <1% | \$14.18 | \$14.81 |
| Farmers Market | 3 | <1% | \$2.32 | \$2.54 |

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 2, 2015

Montana Nonresident Traveler Expenditure Profiles

Average Q2 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

| | All Travelers | Vacation | VFR ¹ | Pass-Through | Business | Shopping* | Other* |
|-----------------------------------|-----------------|-----------------|------------------|----------------|-----------------|-----------------|-----------------|
| Sample size | 3,559 | 1,099 | 675 | 1,152 | 447 | 77 | 103 |
| Nonresident Travelers | 3,140,000 | 970,000 | 597,000 | 1,017,000 | 396,000 | 69,000 | 91,000 |
| Group Size (people/group) | 2.15 | 2.53 | 2.28 | 1.99 | 1.50 | 2.07 | 1.93 |
| Length of Stay (nights) | 4.20 | 5.54 | 5.79 | 1.01 | 6.78 | 0.57 | 6.45 |
| % of All Travelers in Q2 | 100% | 31% | 19% | 32% | 13% | 2% | 3% |
| Gasoline, Diesel | \$31.34 | \$22.35 | \$18.65 | \$48.27 | \$27.40 | \$34.51 | \$31.28 |
| Restaurant, Bar | \$24.73 | \$34.79 | \$29.53 | \$11.81 | \$29.36 | \$17.05 | \$17.27 |
| Retail Sales | \$17.87 | \$22.97 | \$14.24 | \$6.83 | \$20.73 | \$104.45 | \$26.51 |
| Hotel, B&B, etc. | \$16.94 | \$21.71 | \$11.21 | \$14.51 | \$23.30 | \$6.91 | \$10.29 |
| Groceries, Snacks | \$11.77 | \$15.28 | \$14.35 | \$7.15 | \$7.59 | \$31.25 | \$11.69 |
| Outfitter, Guide | \$5.59 | \$13.23 | \$3.07 | \$0.27 | \$6.47 | \$0.00 | \$0.00 |
| Auto Rental | \$2.90 | \$3.55 | \$3.14 | \$0.18 | \$8.83 | \$0.43 | \$1.32 |
| Licenses, Entrance Fees | \$2.42 | \$4.32 | \$2.54 | \$0.70 | \$2.05 | \$1.48 | \$3.11 |
| Rental Cabin, Condo | \$1.80 | \$4.07 | \$1.61 | \$0.00 | \$1.55 | \$0.00 | \$1.43 |
| Made in MT | \$1.75 | \$2.15 | \$2.78 | \$0.97 | \$1.49 | \$0.95 | \$1.77 |
| Campground, RV Park | \$1.51 | \$2.85 | \$0.67 | \$1.25 | \$0.54 | \$0.05 | \$0.71 |
| Misc. Services | \$1.19 | \$2.01 | \$1.28 | \$0.24 | \$0.94 | \$0.24 | \$4.74 |
| Auto Repair | \$0.84 | \$1.08 | \$0.57 | \$0.56 | \$0.48 | \$0.00 | \$5.70 |
| Gambling | \$0.83 | \$0.93 | \$1.50 | \$0.36 | \$1.03 | \$0.00 | \$0.88 |
| Transportation Fares | \$0.06 | \$0.11 | \$0.04 | \$0.03 | \$0.09 | \$0.00 | \$0.00 |
| Farmers Market | \$0.05 | \$0.06 | \$0.09 | \$0.02 | \$0.00 | \$0.00 | \$0.12 |
| Total Avg. Daily per Group | \$121.59 | \$151.45 | \$105.27 | \$93.15 | \$131.85 | \$197.33 | \$116.82 |

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

| Expenditure Category | # of Groups Who Spent | Percent of Sample (n=3,019) | Mean ² of Those Who Spent | Median ³ of Those Who Spent |
|-------------------------|-----------------------|-----------------------------|--------------------------------------|--|
| Gasoline, Diesel | 1982 | 66% | \$47.75 | \$40.00 |
| Restaurant, Bar | 1589 | 53% | \$46.99 | \$32.00 |
| Hotel, B&B, etc. | 1043 | 35% | \$110.22 | \$100.00 |
| Groceries, Snacks | 1001 | 33% | \$35.48 | \$20.00 |
| Retail Sales | 460 | 15% | \$117.37 | \$60.00 |
| Made in MT | 397 | 13% | \$13.52 | \$7.04 |
| Licenses, Entrance Fees | 329 | 11% | \$22.24 | \$10.00 |
| Campground, RV Park | 322 | 11% | \$35.08 | \$35.00 |
| Auto Rental | 191 | 6% | \$45.85 | \$50.00 |
| Rental Cabin, Condo | 109 | 4% | \$112.12 | \$125.00 |
| Misc. Services | 78 | 3% | \$46.11 | \$14.00 |
| Outfitter, Guide | 71 | 2% | \$238.97 | \$300.00 |
| Gambling | 61 | 2% | \$41.24 | \$30.00 |
| Farmers Market | 44 | 1% | \$3.26 | \$4.27 |
| Auto Repair | 20 | 1% | \$123.70 | \$162.49 |
| Transportation Fares | 11 | <1% | \$17.24 | \$18.24 |

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 3, 2015

Montana Nonresident Traveler Expenditure Profiles

Average Q3 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

| | All Travelers | Vacation | VFR ¹ | Pass-Through | Business | Shopping* | Other* |
|-----------------------------------|-----------------|-----------------|------------------|----------------|-----------------|-----------------|-----------------|
| Sample size | 5,631 | 2,840 | 864 | 1,347 | 438 | 52 | 86 |
| Nonresident Travelers | 5,214,000 | 2,633,000 | 803,000 | 1,246,000 | 407,000 | 47,000 | 78,000 |
| Group Size (people/group) | 2.41 | 2.65 | 2.20 | 2.26 | 1.59 | 2.83 | 2.61 |
| Length of Stay (nights) | 5.21 | 6.25 | 6.95 | 1.09 | 8.19 | 1.19 | 5.74 |
| % of All Travelers in Q3 | 100% | 51% | 15% | 24% | 8% | 1% | 2% |
| Gasoline, Diesel | \$28.91 | \$25.27 | \$17.18 | \$45.61 | \$25.48 | \$34.06 | \$26.32 |
| Restaurant, Bar | \$28.47 | \$34.33 | \$30.19 | \$15.66 | \$26.81 | \$16.95 | \$31.45 |
| Outfitter, Guide | \$18.61 | \$33.07 | \$8.63 | \$0.83 | \$4.42 | \$0.00 | \$3.40 |
| Hotel, B&B, etc. | \$16.24 | \$18.51 | \$9.50 | \$14.41 | \$20.26 | \$8.20 | \$21.46 |
| Retail Sales | \$14.58 | \$15.82 | \$16.60 | \$5.70 | \$16.44 | \$67.39 | \$43.74 |
| Groceries, Snacks | \$12.82 | \$15.73 | \$14.89 | \$5.73 | \$10.29 | \$17.75 | \$15.13 |
| Rental Cabin, Condo | \$3.87 | \$5.78 | \$4.37 | \$0.92 | \$0.76 | \$0.00 | \$0.07 |
| Licenses, Entrance Fees | \$3.78 | \$5.25 | \$3.73 | \$1.37 | \$2.08 | \$2.48 | \$2.47 |
| Auto Rental | \$2.85 | \$3.15 | \$3.76 | \$0.29 | \$7.05 | \$0.00 | \$2.51 |
| Campground, RV Park | \$2.13 | \$3.21 | \$0.82 | \$1.45 | \$0.49 | \$0.11 | \$0.54 |
| Made in MT | \$2.11 | \$2.68 | \$2.15 | \$1.15 | \$1.68 | \$0.81 | \$1.16 |
| Auto Repair | \$1.21 | \$0.87 | \$1.27 | \$1.17 | \$3.15 | \$0.00 | \$3.34 |
| Gambling | \$0.56 | \$0.51 | \$1.20 | \$0.25 | \$0.54 | \$0.88 | \$0.28 |
| Misc. Services | \$0.41 | \$0.49 | \$0.30 | \$0.33 | \$0.38 | \$0.23 | \$0.09 |
| Farmers Market | \$0.22 | \$0.31 | \$0.29 | \$0.05 | \$0.12 | \$0.00 | \$0.10 |
| Transportation Fares | \$0.03 | \$0.03 | \$0.04 | \$0.01 | \$0.07 | \$0.00 | \$0.00 |
| Total Avg. Daily per Group | \$136.80 | \$165.02 | \$114.92 | \$94.93 | \$120.02 | \$148.87 | \$152.06 |

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

| Expenditure Category | # of Groups Who Spent | Percent of Sample (n=) | Mean ² of Those Who Spent | Median ³ of Those Who Spent |
|-------------------------|-----------------------|------------------------|--------------------------------------|--|
| Gasoline, Diesel | 3025 | 62% | \$46.53 | \$39.00 |
| Restaurant, Bar | 2635 | 54% | \$52.59 | \$40.00 |
| Groceries, Snacks | 1714 | 35% | \$36.41 | \$20.00 |
| Hotel, B&B, etc. | 1597 | 33% | \$134.29 | \$120.00 |
| Licenses, Entrance Fees | 946 | 19% | \$19.48 | \$9.13 |
| Retail Sales | 857 | 18% | \$82.82 | \$50.00 |
| Made in MT | 844 | 17% | \$12.27 | \$5.00 |
| Campground, RV Park | 793 | 16% | \$37.35 | \$35.00 |
| Farmers Market | 323 | 7% | \$3.35 | \$2.50 |
| Auto Rental | 311 | 6% | \$44.63 | \$50.00 |
| Outfitter, Guide | 281 | 6% | \$322.79 | \$300.00 |
| Rental Cabin, Condo | 275 | 6% | \$185.37 | \$200.00 |
| Gambling | 81 | 2% | \$33.45 | \$25.00 |
| Misc. Services | 79 | 2% | \$25.19 | \$20.62 |
| Auto Repair | 58 | 1% | \$101.73 | \$122.90 |
| Transportation Fares | 9 | <1% | \$15.35 | \$17.03 |

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 4, 2015

Montana Nonresident Traveler Expenditure Profiles

Average Q4 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

| | All Travelers | Vacation | VFR ¹ | Pass-Through | Business | Shopping* | Other* |
|-----------------------------------|-----------------|-----------------|------------------|----------------|----------------|-----------------|-----------------|
| Sample size | 2,275 | 528 | 491 | 744 | 377 | 63 | 72 |
| Nonresident Travelers | 1,941,000 | 451,000 | 419,000 | 635,000 | 322,000 | 54,000 | 61,000 |
| Group Size (people/group) | 1.89 | 2.22 | 1.87 | 1.95 | 1.36 | 1.99 | 1.72 |
| Length of Stay (nights) | 4.66 | 6.77 | 7.11 | 0.76 | 5.79 | 0.41 | 11.04 |
| % of All Travelers in Q4 | 100% | 23% | 22% | 33% | 17% | 3% | 3% |
| Gasoline, Diesel | \$28.47 | \$24.17 | \$16.53 | \$46.03 | \$16.52 | \$30.06 | \$26.22 |
| Restaurant, Bar | \$23.57 | \$31.09 | \$29.86 | \$12.08 | \$28.59 | \$16.44 | \$20.52 |
| Retail Sales | \$19.51 | \$20.11 | \$28.50 | \$6.51 | \$7.33 | \$161.89 | \$8.92 |
| Hotel, B&B, etc. | \$11.87 | \$13.63 | \$7.59 | \$10.39 | \$18.88 | \$4.31 | \$11.56 |
| Licenses, Entrance Fees | \$10.83 | \$38.80 | \$4.88 | \$0.36 | \$0.82 | \$0.98 | \$5.40 |
| Groceries, Snacks | \$10.59 | \$17.18 | \$11.95 | \$7.33 | \$5.32 | \$10.59 | \$12.35 |
| Outfitter, Guide | \$7.51 | \$29.34 | \$0.28 | \$0.00 | \$1.14 | \$0.00 | \$6.23 |
| Auto Rental | \$3.65 | \$3.45 | \$2.92 | \$0.33 | \$12.33 | \$0.00 | \$0.76 |
| Made in MT | \$3.15 | \$3.80 | \$3.55 | \$2.84 | \$2.94 | \$0.00 | \$3.02 |
| Misc. Services | \$1.41 | \$3.54 | \$0.88 | \$0.21 | \$0.41 | \$3.65 | \$3.87 |
| Rental Cabin, Condo | \$0.95 | \$3.39 | \$0.31 | \$0.00 | \$0.17 | \$0.00 | \$1.26 |
| Auto Repair | \$0.78 | \$0.20 | \$1.25 | \$1.35 | \$0.22 | \$0.00 | \$0.00 |
| Gambling | \$0.74 | \$1.69 | \$1.34 | \$0.14 | \$0.00 | \$0.28 | \$0.00 |
| Campground, RV Park | \$0.32 | \$0.87 | \$0.19 | \$0.21 | \$0.01 | \$0.00 | \$0.00 |
| Farmers Market | \$0.05 | \$0.06 | \$0.07 | \$0.01 | \$0.04 | \$0.00 | \$0.18 |
| Transportation Fares | \$0.02 | \$0.00 | \$0.07 | \$0.00 | \$0.04 | \$0.00 | \$0.00 |
| Total Avg. Daily per Group | \$123.42 | \$191.32 | \$110.17 | \$87.80 | \$94.76 | \$228.20 | \$100.29 |

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

| Expenditure Category | # of Groups Who Spent | Percent of Sample (n=1,914) | Mean ² of Those Who Spent | Median ³ of Those Who Spent |
|-------------------------|-----------------------|-----------------------------|--------------------------------------|--|
| Gasoline, Diesel | 1219 | 64% | \$44.71 | \$37.00 |
| Restaurant, Bar | 968 | 51% | \$46.60 | \$35.00 |
| Hotel, B&B, etc. | 711 | 37% | \$102.75 | \$100.00 |
| Groceries, Snacks | 545 | 28% | \$37.22 | \$20.00 |
| Licenses, Entrance Fees | 277 | 14% | \$75.49 | \$23.39 |
| Made in MT | 267 | 14% | \$22.70 | \$7.00 |
| Retail Sales | 243 | 13% | \$153.68 | \$100.00 |
| Auto Rental | 148 | 8% | \$47.06 | \$50.00 |
| Campground, RV Park | 74 | 4% | \$15.63 | \$17.58 |
| Rental Cabin, Condo | 53 | 3% | \$110.40 | \$96.05 |
| Misc. Services | 40 | 2% | \$67.36 | \$34.45 |
| Gambling | 36 | 2% | \$38.71 | \$31.75 |
| Outfitter, Guide | 26 | 1% | \$559.61 | \$662.51 |
| Farmers Market | 25 | 1% | \$3.54 | \$3.18 |
| Auto Repair | 17 | 1% | \$87.65 | \$93.11 |
| Transportation Fares | 3 | <1% | \$13.21 | \$13.21 |

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Montana Nonresident Traveler Quarterly Travel Comparison

Revised

| | Quarter 1 (Jan-Mar) | Quarter 2 (Apr-Jun) | Quarter 3 (Jul-Sep) | Quarter 4 (Oct-Dec) | Year Total ¹ 2015 |
|---|------------------------|------------------------|------------------------|------------------------|---------------------------------|
| Visitation & Length of Stay | | | | | |
| Nonresident Visitors | 1,434,000 | 3,140,000 | 5,214,000 | 1,941,000 | 11,729,000 |
| % of Total | 12% | 27% | 44% | 17% | 100% |
| Nonresident Travel Groups | 709,000 | 1,459,000 | 2,172,000 | 1,023,000 | 5,363,000 |
| % of Total | 13% | 27% | 40% | 19% | 100% |
| Group Size (people per group) | 2.03 | 2.15 | 2.41 | 1.89 | 2.19 |
| Length of Stay (nights) | 3.40 | 4.20 | 5.21 | 4.66 | 4.59 |
| Expenditure Category^{2,3} (Average Daily per Group) | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Year Total¹ |
| Gasoline, Diesel | \$29.76 | \$31.34 | \$28.91 | \$28.47 | \$29.48 |
| Restaurant, Bar | \$25.55 | \$24.73 | \$28.47 | \$23.57 | \$26.40 |
| Retail Sales | \$18.84 | \$17.87 | \$14.58 | \$19.51 | \$16.70 |
| Hotel, B&B, etc. | \$24.62 | \$16.94 | \$16.24 | \$11.87 | \$16.52 |
| Outfitter, Guide | \$6.28 | \$5.59 | \$18.61 | \$7.51 | \$12.25 |
| Groceries, Snacks | \$12.59 | \$11.77 | \$12.82 | \$10.59 | \$12.15 |
| Licenses, Entrance Fees | \$15.68 | \$2.42 | \$3.78 | \$10.83 | \$6.04 |
| Auto Rental | \$4.52 | \$2.90 | \$2.85 | \$3.65 | \$3.19 |
| Rental Cabin, Condo | \$3.16 | \$1.80 | \$3.87 | \$0.95 | \$2.78 |
| Made in MT | \$2.14 | \$1.75 | \$2.11 | \$3.15 | \$2.22 |
| Campground, RV Park | \$0.01 | \$1.51 | \$2.13 | \$0.32 | \$1.43 |
| Auto Repair | \$0.17 | \$0.84 | \$1.21 | \$0.78 | \$0.93 |
| Misc. Services | \$1.52 | \$1.19 | \$0.41 | \$1.41 | \$0.89 |
| Gambling | \$0.97 | \$0.83 | \$0.56 | \$0.74 | \$0.70 |
| Farmers Market | \$0.00 | \$0.05 | \$0.22 | \$0.05 | \$0.13 |
| Transportation Fares | \$0.05 | \$0.06 | \$0.03 | \$0.02 | \$0.04 |
| Total Average Daily per Group | \$145.86 | \$121.59 | \$136.80 | \$123.42 | \$131.85 |
| Total Expenditures | \$351,400,000 | \$744,970,000 | \$1,548,300,000 | \$588,290,000 | \$3,232,960,000 |
| % of Total | 11% | 23% | 48% | 18% | 100% |

¹Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ²Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ³Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

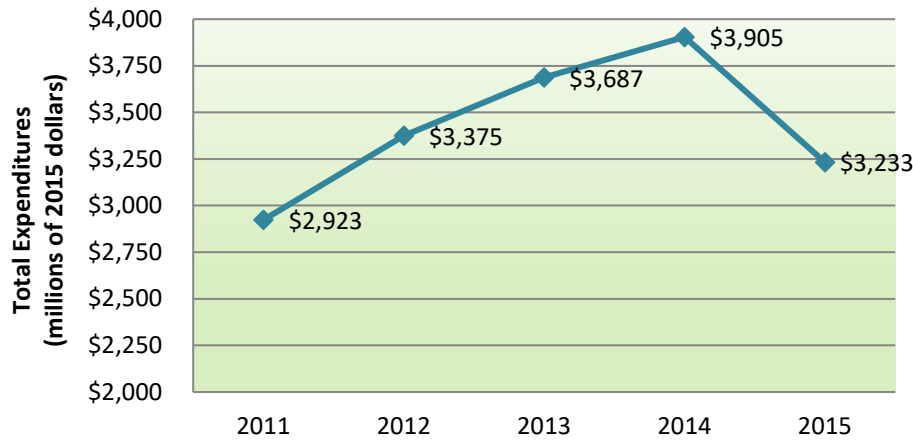
Revised

2005-2015 Montana Nonresident Traveler Expenditure Trends

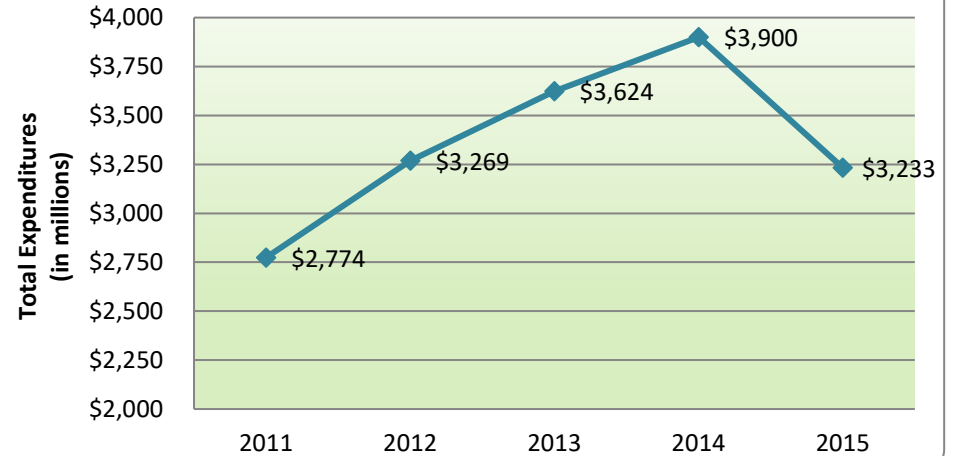
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Total Inflation-Adjusted Expenditures



Total Actual Expenditures



| Nonresident Traveler Expenditure Trends | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|--|------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Total Inflation-adjusted Expenditures (in millions of 2015 dollars ¹) | \$3,343 | \$3,426 | \$3,527 | \$3,003 | \$2,510 | \$2,660 | \$2,923 | \$3,375 | \$3,687 | \$3,905 | \$3,233 |
| % Change from Previous Year | N/A ³ | 2.5% | 2.9% | -14.9% | -16.4% | 6.0% | 9.9% | 15.5% | 9.2% | 5.9% | -17.2% |
| Total Actual Expenditures (in millions) | \$2,755 | \$2,914 | \$3,085 | \$2,728 | \$2,272 | \$2,447 | \$2,774 | \$3,269 | \$3,624 | \$3,900 | \$3,233 |
| % Change from Previous Year | N/A ³ | 5.8% | 5.9% | -11.6% | -16.7% | 7.7% | 13.4% | 17.8% | 10.9% | 7.6% | -17.1% |

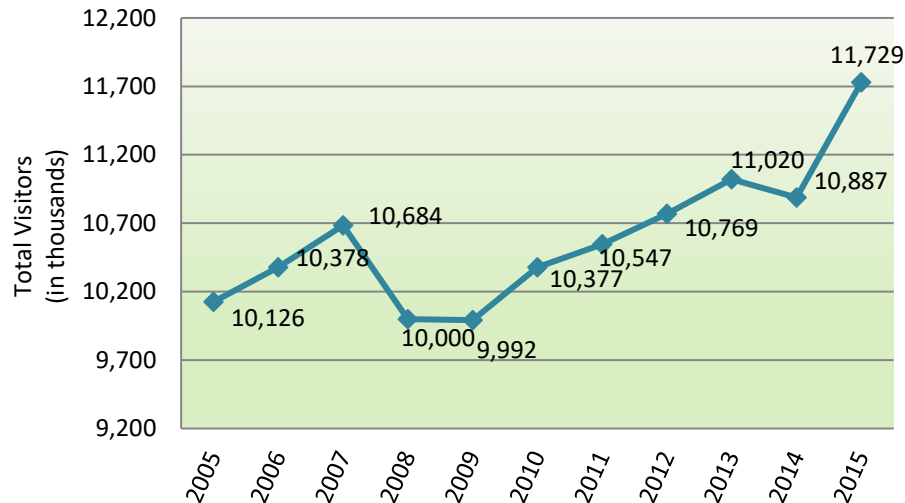
¹U.S. Dept. of Labor, Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers (CPI-U). 1982-1984=100.

²Data are collected quarterly. Therefore, beginning in 2010, year total expenditure is the weighted average of quarterly expenditures.

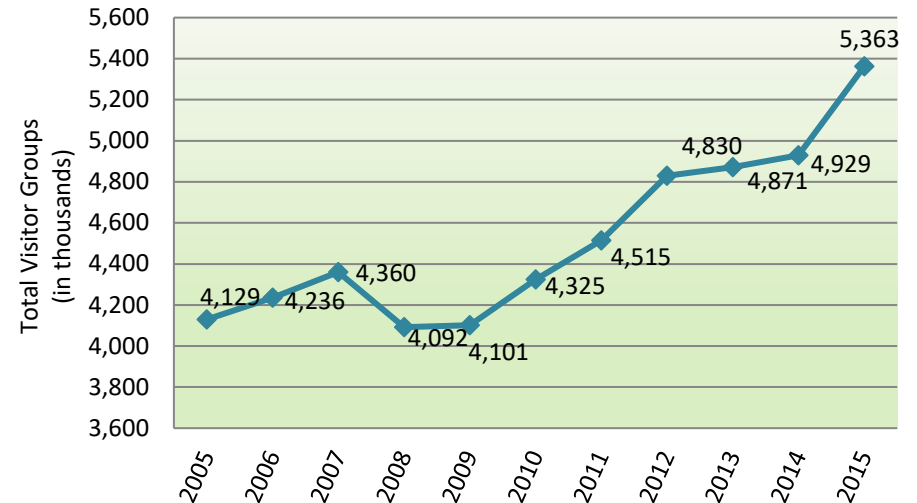
³Comparison to previous years is not advisable due to changes in model data.

2005-2015 Montana Nonresident Traveler Visitation Trends

Nonresident Visitors



Nonresident Travel Groups



| Nonresident Traveler Visitation Trends | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|--|--------|--------|--------|--------|-------|--------|--------|--------|--------|--------|--------|
| Nonresident Visitors (in thousands) | 10,126 | 10,378 | 10,684 | 10,000 | 9,992 | 10,377 | 10,547 | 10,769 | 11,020 | 10,887 | 11,729 |
| % Change from Previous Year | 3.3% | 2.5% | 2.9% | -6.4% | -0.1% | 3.9% | 1.6% | 2.1% | 2.3% | -1.2% | 7.7% |
| Nonresident Travel Groups (in thousands ¹) | 4,129 | 4,236 | 4,360 | 4,092 | 4,101 | 4,325 | 4,515 | 4,830 | 4,871 | 4,929 | 5,363 |
| % Change from Previous Year | -2.6% | 2.6% | 2.9% | -6.1% | 0.2% | 5.5% | 4.4% | 7.0% | 0.8% | 1.2% | 8.8% |
| Average people per group | 2.45 | 2.45 | 2.45 | 2.45 | 2.46 | 2.38 | 2.31 | 2.22 | 2.24 | 2.19 | 2.19 |

¹Beginning in 2010, group size is a weighted average of quarterly group sizes.

Revised

2015 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

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| Overseas Visitors ¹ | | | | Canadian Visitors | | | | Domestic Visitors | | | |
|--------------------------------------|---------------------------------------|--------------------|------------------|-------------------|---------------------------------------|--------------------|------------------|-------------------|---------------------------------------|--------------------|------------------|
| Sample size | 232 | | | 1,829 | | | 12,017 | | | | |
| Nonresident Travelers | 194,000 | | | 1,524,000 | | | 10,012,000 | | | | |
| Group Size (people/group) | 2.37 | | | 2.32 | | | 2.16 | | | | |
| Length of Stay (nights) | 5.66 | | | 2.50 | | | 4.89 | | | | |
| % of All Travelers in 2015 | 2% | | | 13% | | | 86% | | | | |
| Expenditure Category ^{2,3} | Avg. Daily Group Expend. ⁴ | % of Daily Expend. | Avg. Trip Expend | | Avg. Daily Group Expend. ⁴ | % of Daily Expend. | Avg. Trip Expend | | Avg. Daily Group Expend. ⁴ | % of Daily Expend. | Avg. Trip Expend |
| Gasoline, Diesel | \$18.66 | 13% | \$105.66 | | \$33.93 | 24% | \$84.67 | | \$28.99 | 22% | \$141.67 |
| Restaurant, Bar | \$34.99 | 23% | \$198.10 | | \$27.46 | 20% | \$68.51 | | \$26.14 | 20% | \$127.73 |
| Retail Sales | \$19.01 | 13% | \$107.61 | | \$29.48 | 21% | \$73.56 | | \$14.96 | 11% | \$73.11 |
| Hotel, B&B, etc. | \$29.41 | 20% | \$166.53 | | \$16.85 | 12% | \$42.04 | | \$16.21 | 12% | \$79.23 |
| Outfitter, Guide | \$9.20 | 6% | \$52.11 | | \$3.32 | 2% | \$8.30 | | \$13.59 | 10% | \$66.38 |
| Groceries, Snacks | \$19.36 | 13% | \$109.63 | | \$16.20 | 12% | \$40.42 | | \$11.43 | 9% | \$55.87 |
| Licenses, Entrance Fees | \$6.68 | 4% | \$37.85 | | \$5.31 | 4% | \$13.25 | | \$6.19 | 5% | \$30.25 |
| Auto Rental | \$5.13 | 3% | \$29.03 | | \$0.52 | <1% | \$1.29 | | \$3.57 | 3% | \$17.42 |
| Rental Cabin, Condo | \$2.29 | 2% | \$12.95 | | \$1.86 | 1% | \$4.63 | | \$2.89 | 2% | \$14.14 |
| Made in Montana | \$1.43 | 1% | \$8.10 | | \$1.33 | 1% | \$3.31 | | \$2.41 | 2% | \$11.80 |
| Campground, RV Park | \$1.61 | 1% | \$9.09 | | \$1.62 | 1% | \$4.05 | | \$1.40 | 1% | \$6.86 |
| Auto Repair | \$0.06 | <1% | \$0.33 | | \$0.32 | 0% | \$0.79 | | \$1.04 | 1% | \$5.08 |
| Misc. Services | \$0.93 | 1% | \$5.27 | | \$1.24 | 1% | \$3.10 | | \$0.84 | 1% | \$4.13 |
| Gambling | \$0.02 | <1% | \$0.09 | | \$1.03 | 1% | \$2.56 | | \$0.66 | 1% | \$3.24 |
| Farmers Market | \$0.11 | <1% | \$0.60 | | \$0.14 | <1% | \$0.34 | | \$0.13 | <1% | \$0.62 |
| Transportation Fares | \$0.04 | <1% | \$0.25 | | \$0.01 | <1% | \$0.02 | | \$0.04 | <1% | \$0.19 |
| Total Average Daily per Group | \$148.92 | | \$843.20 | | \$140.60 | | \$350.84 | | \$130.51 | | \$637.72 |
| Total 2015 Expenditures | \$76,680,000 | | | | \$240,900,000 | | | | \$2,915,390,000 | | |
| % of Total | 2% | | | | 7% | | | | 91% | | |

¹Numerous overseas visitors may pre-pay for many of their trip expenses, which are not reflected here; these figures represent only expenditures made in MT. ²Data is collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ³Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ⁴Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

2015 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles

Avg. Daily Group Expenditures by Airport of Arrival¹ (Expenditures represent full trip in MT, not spending exclusively in arrival city.)

| Airport of Arrival in Montana ^{2, 3} | | | | | | | |
|---|----------------------|---------------------|----------------------|---------------------|---------------------|----------------------|----------------------|
| | All Fliers | Billings | Bozeman | Great Falls | Helena | Kalispell | Missoula |
| Sample size | 1,512 | 327 | 462 | 150 | 62 | 206 | 265 |
| Nonresident Travelers | 1,260,000 | 270,000 | 390,000 | 130,000 | 50,000 | 170,000 | 220,000 |
| Group Size (people/group) | 1.94 | 1.56 | 2.29 | 1.63 | 1.41 | 2.23 | 1.85 |
| Length of Stay (nights) | 6.64 | 5.35 | 7.66 | 5.49 | 4.64 | 6.99 | 7.45 |
| % of All Travelers in 2015 | 10.7% | 2.3% | 3.3% | 1.1% | 0.4% | 1.5% | 1.9% |
| Restaurant, Bar | \$45.72 | \$40.73 | \$54.84 | \$39.42 | \$44.59 | \$43.74 | \$41.25 |
| Outfitter, Guide | \$32.93 | \$11.55 | \$60.70 | \$8.72 | \$8.52 | \$29.08 | \$34.98 |
| Auto Rental | \$24.55 | \$23.41 | \$29.33 | \$17.28 | \$21.57 | \$25.21 | \$21.62 |
| Hotel, B&B, etc. | \$21.95 | \$24.56 | \$25.83 | \$16.91 | \$26.46 | \$18.34 | \$15.96 |
| Retail Sales | \$18.68 | \$11.73 | \$24.11 | \$14.55 | \$20.59 | \$28.57 | \$13.28 |
| Licenses, Entrance Fees | \$18.62 | \$5.10 | \$41.86 | \$9.06 | \$9.74 | \$15.60 | \$4.62 |
| Groceries, Snacks | \$13.41 | \$7.45 | \$18.77 | \$11.05 | \$8.61 | \$15.28 | \$13.24 |
| Gasoline, Diesel | \$10.56 | \$12.23 | \$11.57 | \$11.03 | \$5.16 | \$7.96 | \$9.17 |
| Rental Cabin, Condo | \$4.82 | \$1.34 | \$5.19 | \$1.17 | \$1.11 | \$11.24 | \$6.97 |
| Made in Montana | \$4.18 | \$3.14 | \$6.33 | \$2.85 | \$3.07 | \$3.14 | \$3.78 |
| Misc. Services | \$1.97 | \$1.33 | \$3.28 | \$1.02 | \$0.65 | \$1.55 | \$1.91 |
| Gambling | \$1.42 | \$2.22 | \$0.91 | \$2.95 | \$1.59 | \$0.19 | \$1.18 |
| Auto Repair | \$0.30 | \$0.59 | \$0.00 | \$0.47 | \$0.00 | \$0.11 | \$0.62 |
| Transportation Fares | \$0.25 | \$0.42 | \$0.23 | \$0.19 | \$0.11 | \$0.28 | \$0.15 |
| Farmers Market | \$0.19 | \$0.10 | \$0.17 | \$0.13 | \$0.19 | \$0.25 | \$0.33 |
| Campground, RV Park | \$0.11 | \$0.04 | \$0.02 | \$0.12 | \$0.07 | \$0.37 | \$0.17 |
| Total Avg. Daily per Group | \$199.66 | \$145.96 | \$283.13 | \$136.90 | \$152.02 | \$200.92 | \$169.24 |
| Estimate of Statewide Spending | \$764,550,000 | \$95,210,000 | \$373,580,000 | \$42,050,000 | \$16,260,000 | \$107,980,000 | \$124,390,000 |

¹Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ²Spending data presented here are representative of expenditures in MT by traveler groups who flew into one of the listed airports. ³Butte and West Yellowstone airports had insufficient sample sizes for inclusion in this analysis.